April 6, 2015

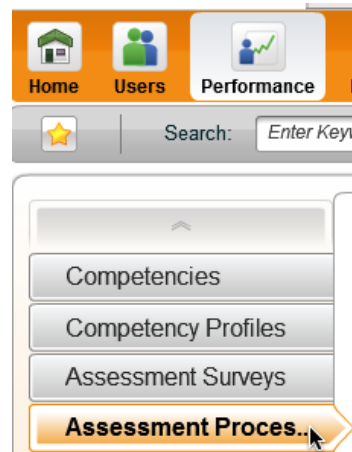## Building the Assessment Process Record

The first step in the 360 Assessment Process is to create the record that will manage and track the supervisor rater assessments. Templates of each assessment process record are available for you to copy. These templates are available to ensure that you modify *only* the fields that will control your survey. It is critical that you do not change fields outside of the steps in this job aid.

Please note: Employees (even non supervisors) may wish to be assessed using a survey that does not match their current position (Executive, Manager, Supervisor, Team Leader or All Employee). These are called Out of Role Assessments and must be managed using an Out of Role Process. The USDA process templates should NOT be used to create these processes. Please see your Guide (Supporting the USDA 360 Assessment Process) to understand more about Out of Role processes.

Step	Activity	View
1.	From the Performance Menu, select **Assessment Processes**.	
2.	Enter the following search criteria: Process ID Contains the word **TEMPLATE**, Status is **Not Started,** and the Domain Starts with **PUBLIC**.	
3.	Click **Search**.	
4.	Several templates will appear. Select edit icon of the template that matches the group you will be managing (Executive, Manager, Supervisor, etc.). **Note:** If you are building an **Out of Role** Assessment Process (See the Guide for a definition of Out of Role) you must use the templates that begin with OOR instead of USDA.	
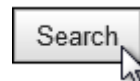
Building the Assessment Process Record

5.	On the Summary screen, click **Copy**.	

Assessment Process ID: USDA-MGR-360-Jan15-2013

Assessment Process Title: USDA Manager 360 Survey

Edit the Assessment Process

Description: Survey used for January 15, 2013 Pilot of 360 Assessment Process
Status: Completed
Assessment Survey ID: USDA-MGR-360-SURVEY
Use Dynamic Survey: No
Domain: USDA
Contact Email: kathleen.fallow@ocio.usda.gov
Enable electronic signature: No   [Copy]

6.	Fill in the fields with the graphic as guidance. **New Process ID**: Replace USDA with your agency acronym and replace the last section with the start date of your process. **New Start Date**: Date when the process is initiated and users receive notification to nominate raters. **New End Date**: Deadline for submitting evaluations. **New Approval Deadline**: Generally one week after the start date.	

Copy Assessment Process

* = Required Fields

Old Process ID: USDA-MGR-360-Jan15-2013

* **New Process ID**:   OCIO-MGR-360-Mar01-2013

* **New Start Date**: (MM/DD/YYYY)   3/1/2013

* **New End Date**: (MM/DD/YYYY)   3/30.2013

New Approval Deadline: (MM/DD/YYYY)   3/8/2013

☐ Copy Users

7.	Click **Copy**.	[Copy]

8.	On the summary page of the new record, enter **USDA** [Group Name] **360 Survey** into the Assessment Process Title field. **Note:** The Assessment Process ID will begin with your agency acronym, but the title should remain as USDA.	* **Assessment Process Title:** USDA Manager 360 Survey

9.	Enter a description for this process.	**Description:** Survey Used for OCIO employees beginning on March 1, 2013.

10.	Check to make sure that the Assessment Survey matches the group you will be assessing. (Managers=MGR, Supervisors=SUPV, etc). If you copied the correct template, this will be done for you.	> **Assessment Survey ID:** 🔍 USDA-MGR-360-SURVEY

11.	Enter your domain in the **Domain** field.	* **Domain:** 🔍 OCIO

Building the Assessment Process Record

12.	Enter your email address in the Contact Email field.	**Contact Email:** `your.name@ocio.usda.gov`
13.	Click **Apply Changes**.	Apply Changes
14.	Click the **Users** tab. **Note:** May *no other changes* on any of the other tabs unless instructed in this job aid.	Options Rater Types Status **Users**
15.	Review the screen to make sure there are no Users that appear at the bottom of the screen. If you see any users listed, remove them and apply changes.	**Add Users to the Assessment Process** Enter User ID or add one or more from list. **User ID:** **Update Users for the Assessment Process** There are no Users in this Assessment Process.
16.	Select the **add one or more from list** link.	Enter User ID or add one or more from list.
17.	Enter search criteria for each of the users who will be assessed; then select the **Add** check box to add them to the list of users. **Note:** If you know the AgLearn IDs of each of your users, you can copy them all into the User ID field, separated with commas. Change the default option to "Any", then click **Search**. Your search results will include all users.	**Search Users** Enter a value for each field that you want to use to filter your search. Some fields allow you to select from a list of values. Y add or remove search criteria to further refine your search. Search **Keyword:** **User ID:** Starts With **Last Name:** Starts With **First Name:** Starts With **Middle Initial:** Starts With
18.	User names will appear at the bottom of the Users screen. Be sure you have included all users to be assessed using this survey.	**Update Users for the Assessment Process** Remove Send Notification Reset Select All / Deselect All Select All / Deselect All

User ID	Supervisor Name	Job Code	Organization	Domain	Select
JJ229989 (Janine, Gillis W)	JOIT9999 (Jeffrey Cordy A)		IT52603000	OCIO-ITS-BSD-ESB	☐
JRIT9278 (John, Rohlwinger P)	DK207165 (Dana, King)		IT5600000000000000	OCIO-ACIO-ITM-CPD	☐

Building the Assessment Process Record

19.	You are now ready to initiate the assessment and send notifications to all users asking them to nominate raters. After confirming with the Agency 360 Program Manager, click the **Status** tab.	

| 20. | Click **Initiate Assessment**.
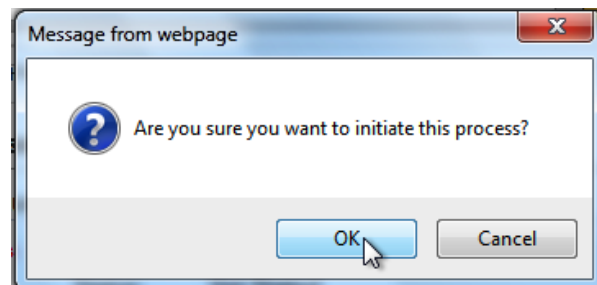
Note: Although you make click the **Initiate Assessment** button several days before the Start Date indicated in the record, users will not receive notifications to nominate raters until the morning of the Start Date. | |

| 21. | Click **OK**. | |

| 22. | The status of the Assessment Process will change to **Started**. | |

| 23. | Once started, you'll need to check often to ensure that users are nominating raters and that raters are completing surveys by your established deadlines. Please refer to "**Supporting The USDA 360 Assessment Process**" for guidance on how to manage the assessment process. | **Supporting the USDA 360 Assessment Process** |